
SAP SuccessFactors HCM Cloud Automated Demo Request Tool

User Guide v 2.0

September 26, 2016

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DOCUMENT REVISION HISTORY:

Author	Date	Version	Notes
Partner Cloud Operations	6/12/2015	V1.0	Initial Release
Partner Cloud Operations	6/25/2015	V1.01	Updated Restricted Access Request Form
Partner Cloud Operations	7/02/2015	V1.02	Updated to reflect availability of the 1502 master
Partner Cloud Operations	7/17/2015	V1.03	Added additional warnings regarding importance of using the correct Provisioning ID when making Demo Requests
Partner Cloud Operations	10/30/2015	V1.04	Introduction of RAR-Demo for streamlined processing of Provisioning accounts
Partner Cloud Operations	01/12/2016	V1.05	Introduction of automated provisioning ID check
Partner Cloud Operations	7/28/2016	V1.06	Regionally-based demo masters deployed
HCM Cloud Operations	9/26/2016	V2.0	New Platform launch. Demo Request Tool now optionally includes JAM.

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1 INTRODUCTION

The SuccessFactors HCM Cloud automated Demo Request Tool is available to Partners, SAP Sales Solution Consultants, Customer Support, Professional Services, and SAP Trainers and training administrators. Each demo instance, or tenant, is a clone of a reference Master, running in a live environment that is configurable by the user. The automated Demo instance Request Tool (DRT) streamlines the creation of SuccessFactors HCM demo instances for both users and Operations and supports overall inventory management in order to efficiently manage SAP data center resources.

2 SAP SUCCESS FACTORS HCM CLOUD OPERATIONS PORTAL

The Demo Request Tool is accessed via the HCM Cloud Operations Portal (<https://hcmcloudops.successfactors.com/>). The portal can be accessed with your SAP-ID login credentials.

3 PARTNER PRE-REGISTRATION

Use of the Demo Request Tool requires pre-registration of the Partner organization. If your company has not been registered, when you navigate to the Tool, you will be advised to submit a ticket via the **“CONTACT US”** link under the **SUPPORT** tab. Select Request Type **“Demo Instance Issue”** and type **“Demo Registration Request”** in the Notes. Your Partner status will be validated by the Ops Service Delivery team and your company registered to use the tool.

4 REQUEST RESTRICTED ACCESS - DEMO

All demo instances are hosted in access controlled data centers. A Provisioning User ID is required for each data center (and specific environment: Test, Demo, or Production within the data center). Log-in to the HCM Cloud Operations Portal and submit a Restricted Access Request - Demo (RAR-Demo) to receive access credentials to manage demos in a specific Data Center(s) Demo environment(s).

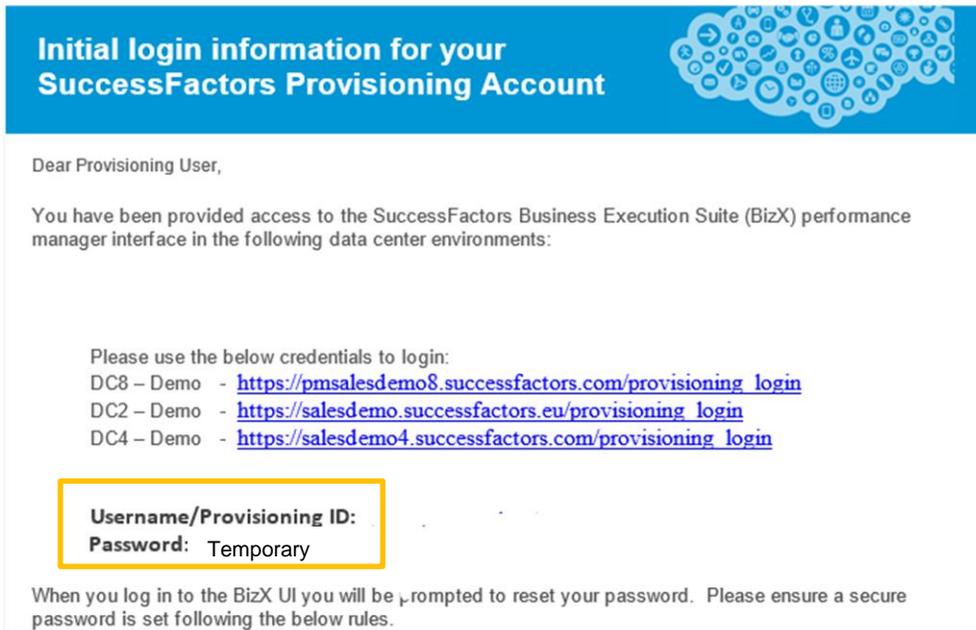
The screenshot displays the SAP SuccessFactors provisioning tool interface. At the top, the SAP SuccessFactors logo is visible. Below the logo is a navigation bar with tabs for OPERATIONS REQUESTS, REFERENCE URLs, DEMO INSTANCE REQUEST TOOL, SUPPORT, and ADMINISTRATION. The OPERATIONS REQUESTS tab is active, showing a sub-menu with REQUEST FORMS and REQUEST STATUS. The main content area is divided into several sections:

- Provisioning Account Mapping Requests:**
 - [Customer Instance Access Request](#) Details
 - [Demo Instance Access Request](#)
- Restricted Access Request - Demo** Details
 - Request a Provisioning ID(s) to one or more Demo Data Center Environments
- Restricted Access Request - Preview & Production**
 - This form is no longer required. A provisioning account in the specified data center environment will be created for you in the processing of a Customer Instance Access Request.
- Terminate Access Request** Details
 - Deactivate access to all existing Provisioning Accounts
- [Provisioning Account Password Reset](#)
- [My Provisioning Accounts](#)

On the right side of the interface, there are two request categories:

- ONB Requests:**
 - [Provision/Set up ONB Instance](#)
 - [Invalidate/Delete ONB Instance](#)
 - [Request for SFTP Credentials](#)
 - [Request Full Account Copy](#)
 - [Request Super Admin User Account](#)
 - [Invalidate/Delete Super Admin User Account](#)
 - [Unlock Super Admin User Account](#)
- BizX Requests:**
 - [BizX New Instance Request](#) Details
 - [Request for SFTP Credentials](#)
 - [Sales/Training Instance Re-Index](#)

Once you submit your request you should receive an email confirmation immediately, and a BizX Provisioning ID/Username and Password for the selected data center(s) demo environment will be provided to you via email within 5 business days.



The image shows an email template with a blue header. The header contains the text "Initial login information for your SuccessFactors Provisioning Account" and a decorative graphic of a brain filled with various social media and business icons. The main body of the email is white and contains the following text:

Dear Provisioning User,

You have been provided access to the SuccessFactors Business Execution Suite (BizX) performance manager interface in the following data center environments:

Please use the below credentials to login:

- DC8 – Demo - https://pmsalesdemo8.successfactors.com/provisioning_login
- DC2 – Demo - https://salesdemo.successfactors.eu/provisioning_login
- DC4 – Demo - https://salesdemo4.successfactors.com/provisioning_login

Username/Provisioning ID: [Redacted]
Password: Temporary

When you log in to the BizX UI you will be prompted to reset your password. Please ensure a secure password is set following the below rules.

When you log in to the BizX UI associated with a data center demo environment, you will be prompted to reset your password. Passwords are independently set for each data center/environment, however you may choose to set the same password for multiple data centers. **IMPORTANT:** User name and Password credentials are specific to the data center, and environment (e.g., Demo, Preview, or Production) within the data center, and must be managed accordingly.

You will need to enter your Provisioning ID when you generate your demo instance via the automated Demo Request Tool. After the specified master has been cloned, the tool will then map this provisioning ID to the instance.

5 GENERATE YOUR DEMO INSTANCE

After logging-in to the HCM Cloud Operations portal, navigate to the Demo Instance Request Tool tab.



Note: If your partner company is not yet registered to use the Demo Request Tool you will be advised to submit a ticket via the CONTACT US link under SUPPORT to initiate registration.

Step 1: To generate a new demo instance, click on “New Request”.



Step 2: Complete the User Information pop-up form. The form will be pre-populated with your name, SAP S-User ID, email address, and phone number. NOTE: Managers will have the option of entering another user’s information here in order to make the request on their behalf.

User Information

Complete the form below to begin.

Note: demo instances created via this tool are not configured for SAP Learning Hub Academy courses.

FIRST NAME

LAST NAME

SAP USER ID

EMAIL

PHONE

Step 3a: The subsequent screen will display the currently active demo masters. Review the descriptions if you need guidance regarding which master to select. Scroll to see all available masters.

Select a Version	
Version	Description
<input checked="" type="radio"/> PEmas2015v1	SuccessFactors Perform and Reward for SMALL BUSINESS. Attention: this is not a complete SuccessFactors Instance and should be used only with your SMB prospects.
<input type="radio"/> ACE 1502 v1 - LAC	ACE master with Role-Based Permissions for Argentina, Brazil, Chile, Colombia, Guatemala, Mexico, Panama, Peru, Venezuela, and the US
<input type="radio"/> ACE 1502 v1 - NA	ACE Master with Role-Based Permissions for Canada and the US
<input type="radio"/> ACE 1502 v1 - EMEA	ACE master with optimized Role-based Permissions for Belgium, Spain, France, United Kingdom, Italy, Netherlands, Portugal, Saudi Arabia, Turkey, South Africa, and the US
<input type="radio"/> ACE 1502 v1 - MEE	ACE master with Role-Based Permissions for Austria, Switzerland, Czech Republic, Germany, Poland, Russian Federation, and the US
<input type="radio"/> ACE 1502 v1 - APJ	ACE master with Role-Based Permissions for Australia, China, Hong Kong, Indonesia, India, Republic of Korea, Malaysia, New Zealand, Philippines, Singapore, Thailand, Taiwan, Province of China and the US
This instance includes all configuration of the SAP SuccessFactors rapid-deployment solutions	

Note: Regionally-based versions of the ACE and BestRun/NGD demo masters have recently been introduced. Two regional versions of the masters (LAC, NA) are available in DC8-Ashburn and three (APJ, EMEA, MEE) in DC2-Amsterdam. Countries included in each of these masters are outlined below. Country-specific configurations for the US are included in all versions of the masters.

DC-8 Ashburn		DC2-Amsterdam		
Latin America (LAC)	North America (NA)	Asia Pacific & Japan (APJ)	Europe, Middle East, & Africa (EMEA)	Eastern Europe (MEE)
Argentina Brazil Chile Colombia Guatemala Mexico Panama Peru Venezuela USA	Canada USA	Australia China Hong Kong Indonesia India Republic of Korea Malaysia New Zealand Philippines Singapore Thailand Taiwan, Province of China USA	Belgium Spain France United Kingdom Italy Netherlands Portugal Saudi Arabia Turkey South Africa USA	Austria Switzerland Czech Republic Germany Poland Russian Federation USA

Instructions for adding individual countries to any of the masters, along with the downloadable global country-specific data models, are available in the Partner [Demo Forum](#) Jam group.

Step 3b: Select a demo master version.

The Data Center(s) in which that particular master is available will display.

Step 4: Select a Data Center.

Step 5: Enter your Provisioning User ID, and click “Submit”. Your Provisioning User ID is typically your email address and is provided, along with a default password, as a response (email titled: “SuccessFactors BizX Provisioning Account Created”) to your [Restricted Access Request \(Demo\)](#).

Select a Version

Version	Description
<input type="radio"/> PEmas2015v1	SuccessFactors Perform and Reward for SMALL BUSINESS. Attention: this is not a complete SuccessFactors Instance and should be used only with your SMB prospects.
<input checked="" type="radio"/> ACE 1502 v1 - LAC	ACE master with Role-Based Permissions for Argentina, Brazil, Chile, Colombia, Guatemala, Mexico, Panama, Peru, Venezuela, and the US
<input type="radio"/> ACE 1502 v1 - NA	ACE Master with Role-Based Permissions for Canada and the US
<input type="radio"/> ACE 1502 v1 - EMEA	ACE master with optimized Role-based Permissions for Belgium, Spain, France, United Kingdom, Italy, Netherlands, Portugal, Saudi Arabia, Turkey, South Africa, and the US
<input type="radio"/> ACE 1502 v1 - MEE	ACE master with Role-Based Permissions for Austria, Switzerland, Czech Republic, Germany, Poland, Russian Federation, and the US
<input type="radio"/> ACE 1502 v1 - APJ	ACE master with Role-Based Permissions for Australia, China, Hong Kong, Indonesia, India, Republic of Korea, Malaysia, New Zealand, Philippines, Singapore, Thailand, Taiwan, Province of

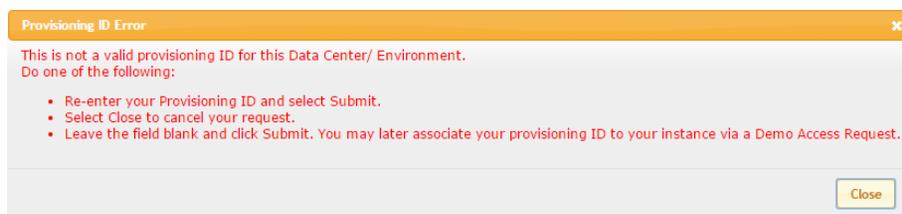
Select a Datacenter:

DC8

Provisioning User ID :

First select a demo Version. The data centers in which the demo is available will display. Select one of the listed data centers. Enter a valid Provisioning ID for the data center you select. If you do not have a provisioning ID specific to that data center please submit a [Restricted Access Request - Demo](#). Once you submit your request you should receive an email confirmation immediately, and a provisioning ID will be provided within 5 business days. You may then associate your Provisioning ID to your demo instance via a Demo Access Request.

The Provisioning User ID will be validated for the particular Data Center Demo environment. If it is not an active Provisioning ID for the specified Data Center Demo environment the following screen will display.



If Provisioning ID validation is successful, a request is sent to the Service Provider Cockpit (SPC) for automated provisioning of the requested demo instance. During this time the main interface within the portal will indicate the status of the demo as “In Process”.

When complete, the status will be updated and indicate “Completed”.



The screenshot shows a table titled "Demo Manager" with a light orange header. The table has six columns: Version, Company ID, Data Center, Type, Expiring On, and Status. The first row contains the following data: ACE 1502 V1, SFPART000258, DC8, ACE, 26-Jun-16 23:59, and Completed. The "Completed" status is circled in green.

Version	Company ID	Data Center	Type	Expiring On	Status
ACE 1502 V1	SFPART000258	DC8	ACE	26-Jun-16 23:59	Completed

The automated processing will take less than 15 minutes for BizX-only instances.

Demo instances including Jam may take up to 30 minutes.

You will receive an email notification of completion which will include:

- The unique identifiers of your demo instance (Company ID), e.g.: SFPART00000
- The demo instance url
- Default User Name and Password
- Link to the BizX Provisioning UI in the specified data center



Sat 9/24/2016 12:08 PM

noreply@sap.com

Your demo instance is ready

To ■

Original Requester : Joe.smith@test.com
Company :

The demo instance is currently being prepared and will be ready momentarily.

Demo Instance "Company ID" : SFPART00
Tenant ID : 000000000

After 30 minutes from receiving this email, you may use the credentials below to verify access.

Company Link : <https://pmsalesdemo8.successfactors.com/login?company=SFPART>
Company User Name : sfadmin
Company Password : runbest
Expiry Date : Dec 23 2016 11:59PM

Please take note of the **Expiry Date** above. Your instance will be automatically deactivated on this date. Your instance will subsequently be permanently deleted in two weeks if not extended.

To extend your instance contact your demo administrator or the original requester of this instance. HCM Cloud Ops Portal users may also extend the instance via the [Demo Request Tool](#).

SuccessFactors Business Execution Suite Provisioning Interface:

To perform backend configuration of your demo instance via the SuccessFactors Business Execution Suite Provisioning interface, go to the link below:
https://pmsalesdemo8.successfactors.com/provisioning_login

You will need a Provisioning ID for the data center demo environment indicated in the URL (for example: //pmsalesdemo8 equates to the DCS sales demo environment).

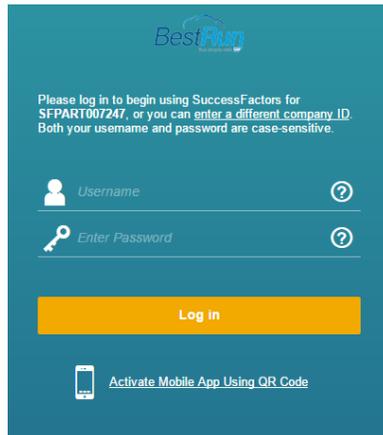
- If you previously requested access to this environment via a Restricted Access Request, your UserName/Provisioning ID and Password is included in the email you received with subject line: "Initial login information for your SuccessFactors Provisioning Account". If you require a Password Reset, submit a Provisioning Account Password Reset on the Operations Request page of the HCM Cloud Ops Portal.
- If you do not have a provisioning ID specific to the particular data center/environment, please submit a [Restricted Access Request - Demo](#). You will receive an email confirmation immediately, and a provisioning ID will be provided within 5 business days. Once you have received your Provisioning ID, you may submit a [Demo Access Request](#) form to have your demo instance manually mapped to your Provisioning account.

If you have any issues accessing the above URLs please submit a ticket to the HCM Cloud Ops Service Desk via the Contact US form under Support tab.

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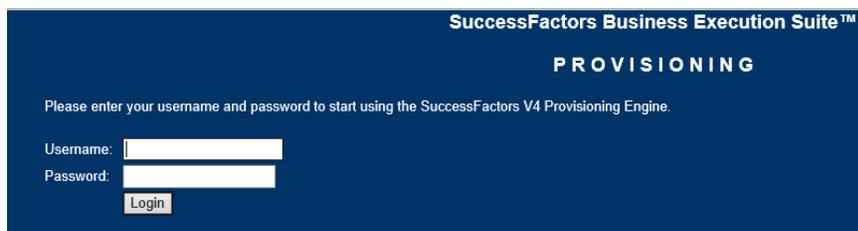
6 LOG IN TO YOUR BIZX DEMO INSTANCE

Within your browser, navigate to the “Company Link” URL provided in the “Your demo instance is ready” email. To begin working with your demo instance, enter the assigned default Use Name and Password supplied in the email.



7 LOG IN TO PROVISIONING

Provisioning access to a demo instance enables you to perform backend configuration of the instance via the SuccessFactors Business Execution Suite Provisioning interface.



Again, reference “Your demo instance is ready” email. Note, the URL provided is unique to a particular data center and environment, e.g., Sales Demo environment in DC8

(https://pmsalesdemo8.successfactors.com/provisioning_login)

- Enter Username (from the email) and Password (either as originally supplied or your new password if you have re-set it).
- **IMPORTANT:** Username and Passwords are data-center specific. If you change your password for one data center it does **not** change your password for any other data center.
- Upon log-in, all of your provisioned demo instances in that data center will be displayed.

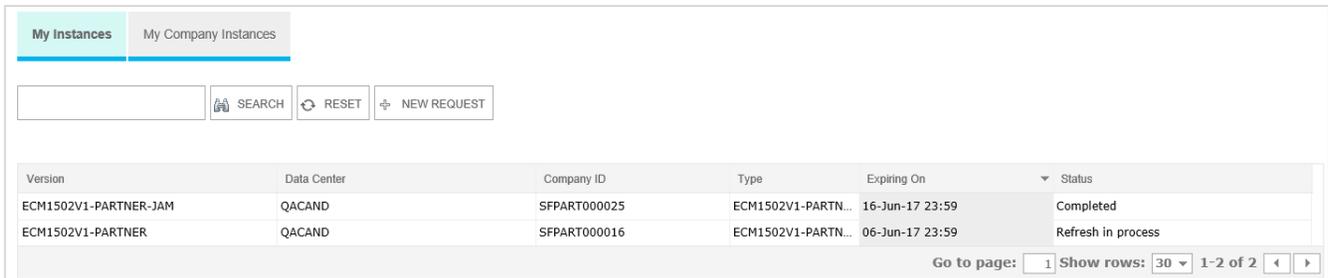
- Double click the instance to open:



8 MANAGE YOUR DEMO INSTANCES

Managers and Users are able to manage (Extend, Refresh, or Delete) their demo instances.

Navigate to the Demo Request Tool to view a list of your demo instances. Double-click a listing in the Demo Manager grid.



Select the action you would like to take against the demo instance.



8.1.1 **Extend Demo**

- This will extend the expiration of the demo instance. Select “Extend Demo”, modify the Expiration date and select “Extend” to complete the request.

8.1.2 **Refresh Demo**

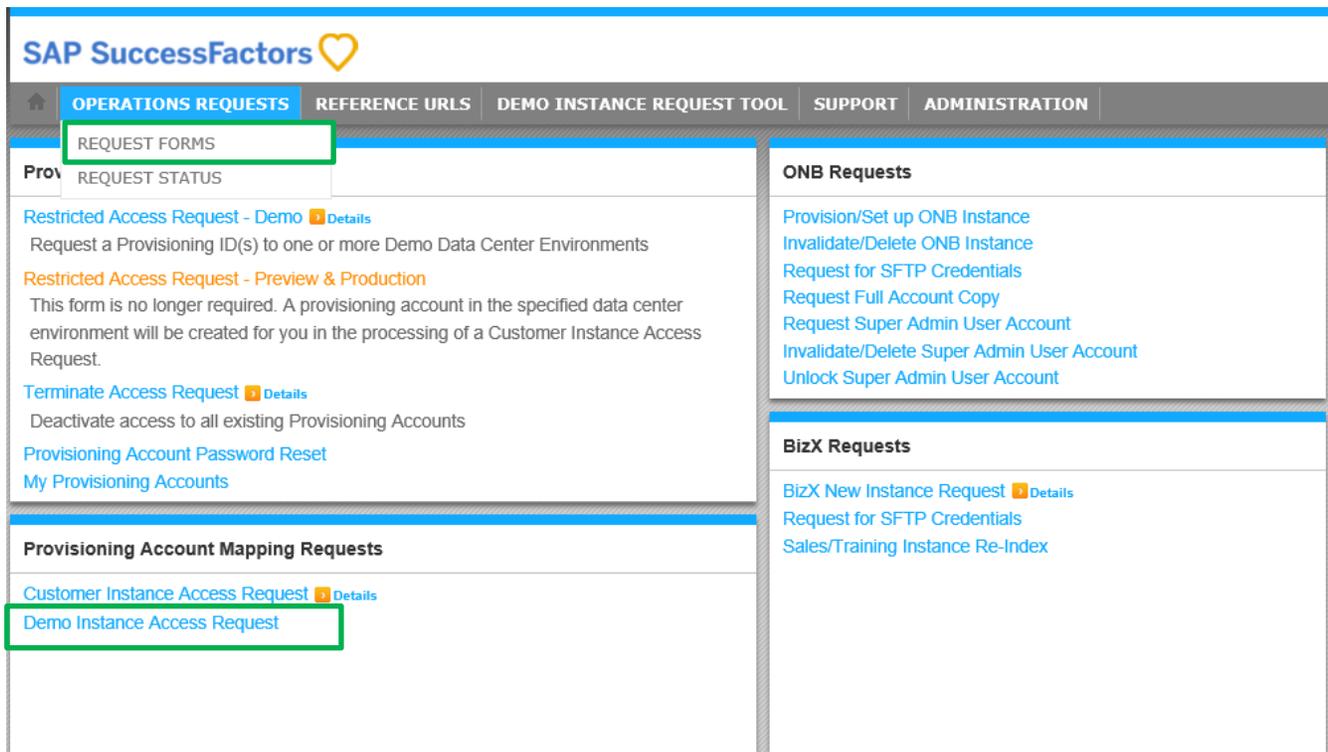
- This will send a request to SPC to reset the demo instance with the default schema. During this time the Status field of the demo on the main interface will indicate the status as in process.

8.1.3 **Delete Demo**

- This will send a request to SPC to have the provisioning account that is associated to the demo un-associated and the demo deleted from the environment. The main interface will indicate that the demo has been deleted and managing functions are no longer available against that demo.

9 **MAP YOUR PROVISIONING ID TO AN EXISTING DEMO INSTANCE**

Request provisioning access to an **existing** demo by mapping your Provisioning ID to the instance via the Demo Instance Access Request under the Operations Request Forms tab.



Complete the Demo Instance Access Request (DAR) form as follows:

- In the first three fields, enter your first and last name and email address.
- In the Customer Name field, if applicable enter the name of the customer (or prospective customer) for which you are preparing the demo.

- Enter the “Company ID”. The Company ID is a unique identifier of the demo instance. If you were the original requester, the Company ID can be found in the email confirmation you received when the demo was created. Additional demos available for mapping are listed under *Implementation | Demo URLs*.
- Enter your Provisioning ID for the applicable data center (Note: your provisioning ID is likely the same for all data centers, and is typically your email address. You must, however, have submitted a [Restricted Access Request - Demo](#) and received provisioning access to the specific data center/environment in which the demo instance is hosted.) You can view your existing Provisioning Accounts via the [My Provisioning Accounts](#) link on the Operations Request Forms page of the portal.
- Select the Data Center in which the demo instance is housed.

Submit the completed form. The mapping will be completed within 5 business days.